

Appendix A

Prospect Qualification Form

Introduction

In order to efficiently and accurately prepare the preliminary requirements document and the subsequent quote, it is important to capture a complete description of the work to be performed. In order to facilitate the process, the following items should be prepared prior to the on-site visit by Orchid's engineering staff:

1. Business Initiative question section below must be completed **before** contacting Pre-Sales Engineer.
2. Customer contacts section below must be completed **before** contacting Pre-Sales Engineer.
3. Host Application Questionnaire for each Application to be ReShaped
4. New Connection Questionnaire
5. Planned Connectivity (network) diagram
6. List of additional customer deliverables for first meeting (see below)
7. Statement of Goals for first meeting
8. Mutual non-disclosure agreement with signature and copy
9. Schedule and cost calculation upon submission

Additional Customer Deliverables due at first meeting

1. Customer should be prepared to describe (and demonstrate) the operation of the existing host application. Written documentation including screen prints will be helpful.
2. Customer should be prepared to describe (at a general level) the content and flow of the new interface to be created and how it relates to the host interaction.

Goals for first meeting

1. Items listed in checklist above, completely and accurately filled out.
2. Rough draft of Targeted Procedure Modeling (TPM).

1. What is customer's business initiative?

Application integration – Web Enablement – Wireless – Data Migration – Public interface translation – Voice – Machine control

2. Why does the customer want to do this?

3. *What client device(s) does the customer prefer, or have in mind?*

4. *If the new interface is HTML (Web) based, will the project be integrated with the customers existing web site (internal or external)?*
5. *What host application(s) will Orchid ReShape?*
6. *What host computer(s) do the application(s) run on?*
7. *What is the customers' timeline? What is influencing this?*
8. *What are the customers' alternatives?*
9. *What are the next action items for this opportunity?*
10. *Does the customer currently utilize teleconferencing? If so what kind?*

Customer Contacts

Business Contacts

1. Executive/Main Contact

Name	
Address	
Phone No.	
Mobile No.	
e-mail	

2. Design Contact – who is the person responsible for working with Orchid before and during the TPM process to assure the Host and Connectivity Questionnaires are properly filled out and the TPM is created in a timely manner?

Name	
Address	
Phone No.	
Mobile No.	
e-mail	

3. Project Manager – Who is the person responsible for overseeing the project as a whole?

Name	
Address	
Phone No.	
Mobile No.	
e-mail	

4. Purchasing Contact

Name	
Address	
Phone No.	
Mobile No.	
e-mail	

IS and Network Contacts

5. IS Contact – Who is the person responsible for overseeing integration of Orchid's TeleShaper into the customers network and establishing remote connectivity?

Name	
Phone No.	
Mobile No.	
e-mail	

6. Machine Room Contact – Name and number for "remote hands" support

Name	
Phone No.	
Mobile	

No.	
e-mail	

New Capabilities Contacts

7. End User Manager – Who is the manager responsible for overseeing the development of the new capabilities?

Name	
Address	
Phone No.	
Mobile No.	
e-mail	

8. TPM Signoff – Who has the authority to approve targeted procedures model?

Name	
Address	
Phone No.	
Mobile No.	
e-mail	

Host Application Contacts

9. Skilled User – Who is the person that is skilled in the use of the host application and that will be available to demonstrate the use of the application during the TPM phase and during the Shaper training phase?

Name	
Phone No.	
Mobile No.	
e-mail	

10. Skilled user's manager

Name	
Phone No.	
Mobile No.	
e-mail	

Notes